

A horizontal bar with segments of blue, green, orange, black, blue, green, blue, and black.

# Driving smarter resourcing

How better visibility transforms  
strategic resource management





The thing about [INSERT YOUR INDUSTRY] is that it's a people business.

No, that's not a misprint. It's a simple reflection of the fact that whatever professional services sector you're in, it's a people business.

Customers come to you because of the calibre and reputation of your people. You deliver through the advice and skills of your people. And to stay ahead of the competition, you need to keep attracting and developing the right people.

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“ An organization may have employees with the necessary skills to move projects along, but these employees get tied up elsewhere and projects remain stagnant... 21% of projects fail because they are not adequately staffed. ”

Aberdeen Group –  
Project Management in  
Professional Services: Managing  
People for Profits (July 2012)

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**So given this universal truth, why are professional services businesses routinely so poor at managing their people strategically? Not in terms of rewarding or incentivising them, but making best use of their human resources, across multiple projects, to drive on-time, on-budget delivery and secure client satisfaction.**

### **The battle for resources**

In a recent Aberdeen Group report, 38% of professional services organizations cited “contention for specific limited resources” as a top project-specific pressure.

Put in more simple terms, time after time, professional services projects are delayed because key resources – key people – aren’t available when they’re supposed to be. Or more accurately, they’re not available when the project plan said they should be... regardless of the fact that they’re actually doing exactly what another project plan requires of them.

The result? An unedifying squabble between project managers – and more importantly, a project hitting the rocks because of a lack of visibility and communication that goes back as far as the initial planning stage. With luck, a whole lot of cajoling and a big budget for late-night pizzas for the team, you might get it back on track. A significant proportion won’t.

### **Cutting the clashes**

The smarter approach, of course, would be take account of existing and scheduled workload when planning projects. If you knew that the specialist you want for your job in Manchester will be in Minneapolis for a month, then you could make sure you avoid clashes – whether by adapting your project plan to include his input later, or by using alternative resource. If he’s the man your client insists on dealing with, then they have to fit around him.

It sounds perfectly logical, but in practice, it rarely happens – and not, we should underline, because project managers don’t appreciate the problem.

Instead, it’s because very few organizations give project managers the visibility they need about what else is happening in the business. Without a centralized system, you’re reduced to having to check multiple diaries and ask countless individuals about their workload. It’s simply not practical: the best you can do is build your schedule around a few key people and hope the others fall into place.



## *At a glance*

- Many PSOs struggle to manage their people strategically
- Staff often end up with clashing commitments, which has a significant impact on delivery
- The ideal would be to plan projects around existing work, but few organizations have the visibility to do this
- A centralized project and resource planning system provides that visibility – and helps long-term resource strategy

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“ A better balance of people and projects. A smarter long-term people strategy. Fewer conflicts between project managers. And fewer delays in delivery. ”

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### The benefits of centralization

But a centralized system combining project management and resource planning has other benefits too. For example, the best project management systems facilitate change handling, automatically updating project documentation if a change is made. That means that project managers can be certain they're working with the latest information when planning a project – rather than a document created six months previously.

What's more, requested changes can be evaluated within the context of the entire project portfolio: when a specialist is asked to stay on site longer, the impact of that on other projects can be foreseen – and the business can make intelligent decisions about priorities.

This same organization-wide visibility can feed into project selection. If you can see that a specific team is already booked to work on a series of projects, then it may not be appropriate to bid for new jobs that will require their involvement. Alternatively, you could see this as the catalyst for highly targeted recruitment, or a longer term people development strategy – building up a cadre of talent with the specific skills that are most in demand.

### Visibility is the key

A better balance of people and projects. A smarter long-term people strategy. Fewer conflicts between project managers. And fewer delays in delivery.

All of this is possible, once you have true visibility into your resources, their skills and their workloads. So if your goal is to be more strategic in your resource management, the first thing you need is a platform that gives you that visibility.





## Ideas in action: **Gaining visibility to manage resource**

**For over 30 years, TAH had specialized in helping its many clients improve business performance. But a lack of visibility about its own resources was in danger of affecting TAH's own performance.**

The professional services company wanted a better way to keep track of its current projects – and particularly, which of its consultants was engaged where. It also wanted to be able to use historical data to help it predict future resource demand.

### **Enhancing management reporting with KeyedIn™ Projects**

TAH decided to replace its basic time recording solution with KeyedIn Projects. Set up quickly, KeyedIn Projects gave the company far greater visibility into the different projects in its portfolio, and into the overall resource distribution. It enhanced TAH's management reporting, enabling it to produce reports about different aspects of the business, and an auditable activity trail to facilitate future analysis, resource projections and project estimation.

Even the basic time recording function was enhanced: KeyedIn Projects made it far simpler for each member of staff to enter their timesheets – which increased the accuracy of the information at project managers' disposal. The impact on TAH's performance was immediate.

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“ *KeyedIn Projects has given us the visibility we were seeking about resource deployment – as well as a wealth of other features that are helping drive project performance across the business.* ”

*Brian Tudhope,  
Group IT Manager, TAH*

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## Product focus: Five ways KeyedIn™ Projects helps you manage your resources more strategically

KeyedIn Projects is a fully integrated suite of business applications designed to support professional services organizations at every stage of project and program management. Delivered via SaaS, it gives you a centralized view of your company's resources and commitments – so you can better manage resources to deliver results.

KeyedIn Projects empowers you to:

### 1. See who's working where, when

KeyedIn Projects provides a single, central tool for managing resources across every project and every team. It allows anyone within the business to see who is scheduled to work on what projects, where – and how long they are committed to them. And that same information is available to all your users. It is the essential foundation of more strategic resource management.

### 2. Plan around existing commitments

Because KeyedIn Projects provides a single central repository of future commitments, it becomes far easier to plan around those commitments. You can see when specific resources will be available, and either build your schedule to accommodate the current workload, find an alternative resource or identify who best to approach regarding reallocation. KeyedIn Projects also simplifies the scheduling and resource planning process further by helping you learn from past projects: if team A habitually completes a week after schedule, then you can build appropriate contingency in.

### 3. Cope with change

Take a more strategic view of change requests. With KeyedIn Projects, you can assess the resource impact of agreeing to a scope change – not only on your project, but across the entire portfolio. Then the business can judge whether to accept or even prioritize the change, or reject it, based on clear evidence of the likely costs and benefits.

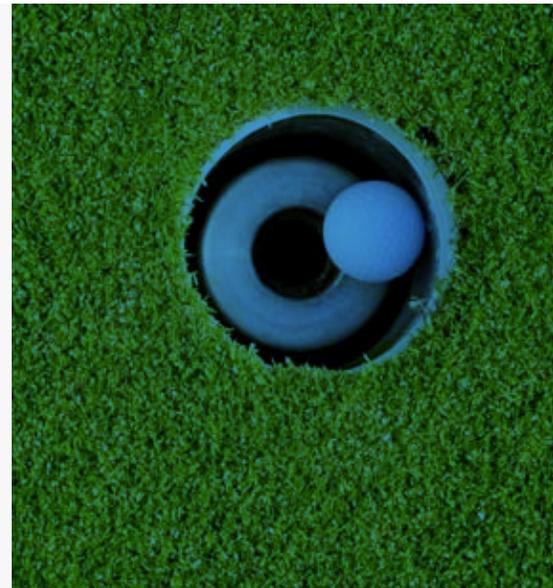
*Have you seen our Ideas in Action paper on Coping with change? Download it at [www.keyedinpso.com](http://www.keyedinpso.com)*

#### 4. Pick projects you can deliver

Avoid pitching for – and winning – problem projects through more effective resource analysis. By using KeyedIn™ Projects to review existing commitments before you invest time and effort into bidding, you can weed out the projects which will put extra strain on already over-stretched resources. Instead, you can focus your efforts on improving the pipeline for teams that have gaps that are likely to be available.

#### 5. Match your workforce to your workload

Workforce planning typically rests on gut instinct and budgetary constraints. But with KeyedIn Projects, you can identify precisely what resources you will need over the coming months – whether to ensure you meet existing commitments or to give you the capacity to respond to new opportunities. You can pinpoint where there are shortfalls, where it will be critical to retain talent, and where it may be possible to build up skills over the longer term. That can then inform decisions about recruitment, retention and development.



#### Discover how

Time to take a more strategic approach to your resource management? Talk to KeyedIn today: because of our SaaS delivery model, you could be up and running with KeyedIn Projects in just 2 weeks – perfect for your next planning cycle. Contact us on 888-960-5472 to find out more.



Put us to the test: visit [www.keyedinpso.com](http://www.keyedinpso.com) to sign up for a free, no-obligation 15-day trial.



## About KeyedIn™ Solutions

KeyedIn is an agile Cloud-based software company focused on delivering powerful results in critical areas like project management and custom manufacturing to specialized vertical markets. Solutions include project portfolio management (PPM), professional services automation (PSA) and enterprise resource planning (ERP) systems that are offered in several editions to support the needs of both small-medium size businesses and large multi-national corporations. And KeyedIn Flex, the company's rapid application development platform, allows custom applications to be developed faster and more affordably than ever before.

With the needs of today's businesses in mind, KeyedIn offers a true SaaS model for a more flexible, scalable and affordable means to solve complex problems and deliver business results faster.

Keep up with us at [www.keyedin.com](http://www.keyedin.com)



*Part of the KeyedIn Solutions Business Portfolio*



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